

Part One: About the RFP

Section Two: Milwaukee Service Delivery Structure

1. Primary Functions and Points of Coordination

For the 2006-2009 W-2 and Related Programs Contract cycle, the Department has made some significant service delivery structure changes in Milwaukee County which will require a competitive process. There will be three types of W-2 Contract Agencies in Milwaukee, each with a different area of specialization. By creating agencies with a more specialized focus, our goal is to better target services to the unique needs of each W-2 participant. This section of the RFP describes the functions of each of the three types of agencies and explains how coordination across the different agencies and functions will occur. This section also outlines the Department's process for establishing a Preferred Provider Registry for provision of specialized services that will assure quality service, cost savings and community involvement.

1.1 Case Management Agencies (CMA) (Service Providers at Job Center Sites - 1 - 5 Entities)

The CMA is the front door for all individuals wishing to apply for W-2 services. For all W-2 applicants, the CMA must:

- A. Determine eligibility for W-2;
- B. Conduct initial employability screening and educational assessment and administer career assessments to those individuals who are likely to have an employment focus; and
- C. Based on the outcome of an individual's employability screening and educational and career assessments, determine appropriate W-2 track, including: 1) Services to individuals with an immediate employment focus; 2) Services to individuals for whom an employment focus is not immediately appropriate; and 3) Services to individuals with a reasonable chance of obtaining SSI.

1. *Services to Individuals with Immediate Employment Focus - Coordination between CMA and JDPA*

For those individuals for whom up-front job search and employment services are appropriate, there will be a joint case management and service planning approach between the CMA and the JDPA.

For this population, the CMA retains the Financial Employment Planner (FEP) roles described in the W-2 Manual. The CMA is responsible for ongoing eligibility determination, issuance of benefits, documenting case information in CARES, and provision of supportive and educational services including basic education, literacy and ESL services. The CMA will coordinate with the JDPA in all of the following areas:

- Interpret career assessments, review labor market information, develop job seeker's long-term career plan and assign up-front job search activities using the W-2 employability plan in CARES;
- Continue to assess job readiness during up-front job search and make appropriate placement decisions (i.e., CSJ, Trial Job, Case Management for job-ready individuals). If employment is obtained during the up-front job search, the individual will be assigned to the appropriate case management placement and employment stabilization services will begin;
- After W-2 placement is made, assign W-2 activities based on job readiness steps outlined in career plan. This may include, but is not limited to CSJ work experience and training, customized skills training, follow-up career assessments, and basic education services. *Note: When disputes arise regarding whether an individual is appropriate for services from the JDPA and/or the types of activities a participant is being assigned to, the JDPA will have the final decision;*
- Use frequent/periodic case management meetings (as defined in the W-2 Contract Agencies' Guarantees) to assess progress, adjust job seeker's employability plan and update assignment of activities;
- Coordinate employment stabilization services for each newly employed individual for a period of at least 12 months. The CMA and the JDPA specialize in different areas of employment stabilization:
 - The CMA provides intensive follow-up case management services including supportive services and planning for career advancement;
 - The JDPA assumes responsibility for addressing on-the-job retention issues with employer and rapid reattachment services if initial job is lost.

2. *Services to Individuals for Whom Employment Focus is Not Immediately Appropriate*

For those individuals for whom an employment focus is not immediately appropriate (includes those appropriate for soft-skills Community Service Jobs, W-2 Transitions, Caretakers of an Infant, 18 and 19 year olds in education, and some case management placements), the CMA determines initial W-2 placement and develops the individual's employability plan using current W-2 policy.

The CMA is responsible for ongoing eligibility determination, issuance of benefits, documenting case information in CARES (i.e., W-2 automated case management system), provision of services including basic education, literacy and English as a Second Language (ESL) services and provision of supportive services (e.g., transportation). The CMA retains sole responsibility for all ongoing case management functions and provision of services for these individuals until the individual is ready for employment focused

services with the JDPa, the individual is no longer eligible for W-2 or the individual is determined to be an appropriate referral to the SSI Advocacy agency.

Additional responsibilities of the CMA will include:

- Referring individuals as needed to Preferred Providers for specific services (e.g., formal assessments, treatment, counseling). More information about the Preferred Provider Registry follows in sub-section 1.4 below;
- Assisting with supportive service needs;
- Developing and managing Community Service Job (CSJ) soft-skills training work sites;
- Administering EA and JALs;
- Determining appropriate referral of W-2 participants to SSI Advocacy Agency; and
- Providing FSET case management services.

3. *Services to Individuals with Reasonable Chance of Receiving SSI/SSDI - Coordination between CMA and SSI Advocacy Agency*

Through screening and formal assessment and consultation with the SSI Advocacy Agency, the CMA is responsible for identifying individuals who have a reasonable chance of obtaining SSI. When there is agreement between the individual, the CMA and the SSI Advocacy Agency that the individual is appropriate for SSI advocacy, the individual is transferred to the SSI Advocacy Agency for provision of all further W-2 benefits and services. Points of coordination between the CMA and SSI advocacy agency include the following:

- Coordinate prior to each participant referral to the W-2 SSI Advocacy Agency to determine reasonableness of the individual being found eligible for SSI and/or SSDI;
- Enter into an agreement on inter-agency processes to make needed improvements and minimize inappropriate referrals to the SSI Advocacy Agency (i.e., referral of W-2 participants who are not likely to be approved for SSI/SSDI payments and instead are more appropriate for employment and training goals). *Note: When disputes arise regarding whether an individual is appropriate for transfer to the SSI Advocacy Agency, the SSI Advocacy Agency will have the final decision;* and
- Provide information about SSI/SSDI payments, timeframes, SSI/SSDI requirements, and the voluntary Ticket to Work program for the CMA's discussion with W-2 participants prior to the CMAs' referrals to the SSI Advocacy Agency.

1.2 Job Development and Placement Agency (Service Providers at Job Center Sites - 1 - 5 Entities)

The JDPA specializes in connecting W-2 job seekers with job readiness services, work experience, training opportunities and employment. The JDPA is responsible for the following:

- A. Coordinates with the CMA in all areas described above in sub-section 1.1.C.1;
- B. Ensures that all staff within the JDPA agency (e.g., employment services representatives, job developers, training providers, CSJ worksite managers) share information and consult regularly regarding the job seekers' needs;
- C. Provides direct services to job seekers, including:
 - 1. Structured and supervised job search assistance, including additional career assessments;
 - 2. Employment-focused customized skills training to W-2 participants. Need for training is based on job readiness steps identified in career plan;
 - 3. Job placement services;
 - 4. Employment stabilization services, including rapid reattachment services if participant loses unsubsidized job;
 - 5. Brokering connections to other public workforce development programs, (e.g., WIA, technical colleges);
 - 6. FSET employment services; and
 - 7. Monitoring and tracking participants' progress using CARES.
- D. Outreach and coordination with WDBs, employers, technical colleges, and other service providers to:
 - 1. Develop employment opportunities;
 - 2. Develop and manage work experience and occupational skills CSJ sites;
 - 3. Develop employer demand customized skills training, open entry/open exit training;
 - 4. Combine funding sources, including W-2, FSET and WIA to maximize resources; and
 - 5. Build sector-based career ladders.

In order to maximize employment opportunities for job seekers, the JDPA must connect with local Milwaukee economic initiatives. Examples of these are the Wisconsin Regional Training Partnership's Construction Center of Excellence and Initiative for a Competitive Milwaukee.

There are a number of ways in which the JDPA organizational structure can be set-up to successfully perform the required functions. An agency with a broad range of employment and training experience and strong connections within the Milwaukee business community could potentially perform all of the JDPA functions in-house. However, given the broad range of responsibilities and the large capacity needed to serve the Milwaukee W-2

population, it may be more feasible for one experienced employment and training organization to act as the lead agency and sub-contract out one or more of the JDPa functions. Examples of sub-contracted functions may include developing and managing the customized skills training courses and the work experience CSJ sites; provision of job readiness workshops and job search assistance; and outreach and coordination with employers to identify needed skill sets and develop employment opportunities. This type of multi-organizational partnership would bring together a broad range of expertise from the employment and training community and the needed capacity to achieve the desired outcomes of the W-2 program.

1.3 SSI Advocacy Agency (One Entity at Multiple Service Sites)

The SSI Advocacy Agency becomes the sole agency responsible for the case management of W-2 participants who are determined to have a reasonable chance of obtaining SSI/SSDI. Primary functions of the SSI Advocacy Agency include:

- A. Coordinates with the CMA in all areas described above in sub-section 1.1.C.3;
- B. Conducts ongoing eligibility determinations, issues W-2 payments, documents case information in CARES, and provides supportive services;
- C. Provides functional and other assessments and supportive services, including use of the Disability Navigator program;
- D. Performs all W-2 case management functions and assigns appropriate W-2 activities;
- E. Provides information regarding SSI/SSDI payment amounts, timeframes, SSI/SSDI requirements, and the voluntary Ticket to Work program to all W-2 participants who are referred from the CMA to the SSI Advocacy Agency to support participants in their informed choice about pursuing SSI/SSDI approval;
- F. When appropriate, refers participants to a Preferred Provider for services such as AODA/mental health assessments, and AODA/mental health treatment and counseling;
- G. Provides necessary documentation and advocacy to facilitate prompt approval of SSI and/or SSDI payments;
- H. Integrates SSI Advocacy Services with other programs, including:
 - 1. Working to integrate services between the SSI Advocacy Agency and other Milwaukee County program providers, including the Bureau of Milwaukee Child Welfare (BMCW), local domestic abuse programs, the Milwaukee County Child Support Agency; and other program services for participants/families who receive services from multiple program providers; and
 - 2. Working with CMAs to encourage their use of the Disability Navigator project.

- I. Provides services to support the smooth transition of participants moving from W-2 to SSI/SSDI, including access to information on Medicaid, BadgerCare and other programs that may be available to the SSI/SSDI recipient.

1.4 Preferred Provider Registry

The Department will establish a Preferred Provider Registry that will include service providers from the Milwaukee area that have been selected through a certification process to provide the following the services: A) formal assessment for AODA, mental health issues and other types of disabilities; B) treatment and counseling for AODA and mental health issues; C) vocational assessments; and D) services to address domestic abuse.

When a W-2 participant has been identified as having a need for one of these services, the W-2 Contract Agency will work with the participant to select a provider from the registry to perform the service. A fee for service model will be established to cover the expense of the services not covered by Medicaid or other available funding.

In order to ensure the registry will include an array of high-quality service providers, the Department will conduct community outreach so that all potential providers are aware of this opportunity. A request for applications from providers who wish to be certified will be issued on July 29, 2005. The deadline for returning the applications to the Department will be September 2, 2005, with a final announcement of the selected providers on October 28, 2005.

Criteria that will be used to select providers for the registry will include, but are not limited to:

- Connections to the Milwaukee community;
- Array of services;
- Ability to provide gender, age and culturally responsive services;
- Qualifications of staff including appropriate licensures and certifications as a provider of the service;
- Unique features that make the provider exceptional in their service field; and
- Provider agency is financially sound and can demonstrate that they have appropriate financial management procedures in place.

1.5 DWD Ombudsperson

A DWD Ombudsperson will be located in Milwaukee to work with W-2 applicants and participants to investigate and resolve complaints and concerns. The Ombudsperson will work closely with the Milwaukee W-2 Contract Agencies, W-2 Agency sub-contractors, providers on the Preferred Provider registry, DWD staff and other community stakeholders to ensure applicants and participants receive appropriate services. The W-2 contract agencies will work cooperatively with the Ombudsperson by responding to requests for case files, providing access to staff, and responding to other requests from the Ombudsperson.